Profile

**Strategy, marketing, & communications executive** experienced with **creating, implementing, and managing** a research function to analyze market & competitor trends. Mastery in distribution of insights across an organization driving sales, retention, and profitability. Expertise in leading cross-functional teams to identify new products and market opportunities. Demonstrated competence in Fortune 100 organizations.

Skills Summary

|  |  |  |
| --- | --- | --- |
| * Research Development * Strategic Planning * Market Planning * Competitive Intelligence * Strategic Sales Solutions | * Budget Management * Communications * Project Management * Cost- Savings Initiatives | * Vendor Management * Process Development * Benchmarking * Resource Management |

Professional Experience

* **Research Development** –Managed a comprehensive research program to 1) design industry benchmarks, 2) monitor, quantify and communicate significant market changes, 3) assess implications, and (4) integrate into planning
* **Strategic Planning** – Consulted with partners during strategic and operational planning activities about marketplace information, providing thought leadership, factual context, and market insights to deliver measurable results
* **Market Planning** – Conducted independent analyses and developed insights including identifying market opportunities, emerging threats, and 360° marketing campaigns to drive revenue
* **Competitive Intelligence**—Designed, evolved, and managed a comprehensive CI program to identify differentiators
* **Strategic Sales Solutions** – Created comprehensive Sales Intelligence Program to support national front-line employees with tactical information to retain assets and win new accounts (sales “tools” downloads averaged 200/month)
* **Budget Planning** – Created annual research budget of $1 million to meet research needs aligned with strategy
* **Communications** –Developed communications to support the Executive Management Committee, Board Documents, external presentations, white papers, and employee communications
* **Project Management** –Designed comprehensive programs to collect, process, and distribute strategic intelligence using the corporate intranet, extranet, workstations, and collaborative worksites (e.g. SharePoint)
* **Cost-Saving Initiatives** – Captured cost reduction opportunities resulting in $2 million+ in savings (Six Sigma project)
* **Vendor Management** – Negotiated firm-wide market-data contracts and ensured agreements were fully leveraged
* **Process Development** –Created and managed the New Hire Debriefing Program to extract tacit knowledge from 200+ new hires and integrated this “difficult to obtain” intelligence into compliance-approved sales and training modules
* **Benchmarking** –Identified operational benchmarks and streamlined internal research processes to reduce waste by 25%
* **Resource Management** – Managed a team of internal and external research resources responsible for acquiring, analyzing, and distributing competitive insights across the company

Employment History

Owner/Principal – Strategic Business Solutions, Charlotte/NC (2011 - present)

Design and implement market, competitive and sales intelligence systems to help clients increase market share, revenue and sales productivity. Develop communications programs to transmit key insights across client firms.

Vice President Competitive Intelligence – TIAA-CREF, Charlotte/NC (2004 - 2011)

Provided all market and competitive intelligence across the firm for this $480 billion retirement leader to drive strategic, marketing and sales planning.

Vice President Strategic Research – Merrill Lynch, Princeton/NJ (2000 – 2004)

Senior Business Consultant – Strategy Research Institute, New York/NY (1999-2000)

Associate General Counsel – City of New York Law Department, New York/NY (1995 -1999)

Education

Fordham University – MBA in Strategic Management & Marketing, New York/NY

Hofstra University – JD in Corporate Law, Hempstead/NY

Clark University – BA in Government Relations, Worcester/MA